
Meridian-1 to Succession 3.0 Upgrade Sales Guide – USA Market

NOTE: This guide is meant for Authorized Channel Partners and Nortel Networks Sales Teams only. **This guide is NOT to be distributed to end customers.**

Please ensure you understand the new Succession 3.0 software structure (CVSD), the upgrades process and the use of the OrderPro tool before using this guide. This handy guide does not replace the related Product Bulletins, Sales & Marketing Bulletins and Training Material for Succession 3.0.

Succession 3.0 software upgrade pricing is user based. For upgrades to Succession 3.0, the Software Service Transaction Fee (599SL1-1) will be eliminated and customers will be charged a fee on a per-user¹ basis.

For customers upgrading from **Release 15 and later** to Succession 3.0, the PC based application OrderPro is mandatory to translate the system software to the new CVSD structure. OrderPro will calculate the number of users that are being upgraded (upgrade quantity). The NTE950LL code is used for systems upgrading with between 100 and 1200 users. For system with 99 or fewer users a minimum fee (order code NTE950MN) is charged and for systems 1200 or greater users a maximum cap is charged (order code NTE950MX). [This software upgrade price doesn't include potential hardware change].

For customers upgrading from **Release 14 or earlier** to Succession 3.0, the translation to the new CVSD software structure is done manually. NTE958AA (Analog per-user code), NTE958DA (Digital per-user code) and the NTE958GA (ACD Agents - no charge code) are used to declare the number of users upgrading to Succession 3.0 within specified minimums and maximums for each machine type. [This software upgrade price doesn't include potential hardware change].

To help incent the Meridian 1 installed base to migrate to Succession 3.0, there are two Marketing Program options available. Please review the Upgrade Express Distribution Management Notice and the Succession Advantage Upgrade Program Distribution Management Notice for specific program terms and conditions.

Please contact your account representative for further information related to the new Succession 3.0 Price Structure.

Steps to upgrade to Succession 3.0 for Meridian-1 systems:

1. Determine the correct **Service Level** (i.e. the feature packages to include) and **number of users** (including spare software capacity) to upgrade. For Release 15 and later these decisions are made in the OrderPro tool for the installed system² when processing the .LOG file.
2. If you use **Meridian Configurator**, run the Upgrades Module to create the quote and equipment list.
 - You will need to input the number of Users to be upgraded on the Installed Software page.
 - For Release 15 and later upgrades you will also input the .OPI filename (this gets printed as a header on report 9, MC does nothing else with it).
 - If you chose to downgrade your system Service Levels you must input that on the Proposed Software page (remember there is no automatic link between OrderPro and MC...you are it!). If you need to Upgrade your Service Level or add additional User (Service ISMs) or features (System ISMs) you can do it on the Proposed Software page on MC.

¹ The total number of Users to upgrade must include the configured Internet, Digital, Analog, Class and Wireless(companion) stations and optionally any spare software capacity (up to the limit of spare TNs as calculated by OrderPro) desired

² If the system is powered down or in storage it may not be possible to run OrderPro, in this case you need to work out a "declared" number of users to upgrade and an equivalent Service Level manually.

3 The "equivalent" service level is the lowest level in the CVSD structure that includes all the features currently installed in the system (in LD 22 PKG) - it is called the detected service level in OrderPro

3. Place your **Upgrade Purchase Order** ensuring that :
 - For Release 15 and later the Quantity of NTE950LL must match the upgrade quantity in OrderPro, or for systems with less than 100 users or greater than 1200 users the appropriate code is included (1 x NTE950MN / MX)
 - For Release 15 and later Don't forget to include the exact <filename> of the OrderPro .OPI file in the notes section of your PO. Nortel will build your new keycode based on this <filename>.OPI. Make sure the exact <filename>.OPI has been sent to Nortel before the PO is sent otherwise the order will go on hold.
 - For Release 14 or earlier include the declaration of number of users to upgrade, the equivalent (or lower) no charge service level code and send a LD 22 printout.

The following section of this guide is focused on the decisions you have to make when upgrading a system to Succession 3.0.

Key sales engineering decisions you must make:

1. What is the appropriate Service Level?
2. How much spare software ISMs capacity should be allocated?

Checks to do on the OrderPro Summary Report (for all Rls15 & later upgrades to Succession 3.0):

1. Review the **Total Upgrade Quantity**, this number multiplied by NTE950LL is the software upgrade price. It includes the spare capacity allocation shown as "wired for digital" and "wired for analog" in the report.
2. Under "Software Features" **review the Detected vs Desired Service Level** and resulting "Features removed".
3. Under "Software Features" **review the "not supported" features** that will be removed from the keycode. If any are required to remain on the system - you will need Product management approval.
4. Under "Software Features" **review the featured added list** (even if you "Downgraded" the Service Level)
5. Select the **"Save & Send OPI file"** button to create the .OPI file. The file will send by FTP automatically if you are connected to an external network and if your firewall permits.

Decision Flowchart (for all releases):

